Clare =
Richard
Bill

Questions 7 Records Mgmt. Issues/for next
                                                    meeting.
Role legal dept. has played

Wanted to get list of coordinators
All Records Mgmt. People together.

* Introd. Training N.y.. People train - then move
     m - someone else trained.
   Worked ok but -
   when still developing program - concerned
Felt when
Training coordinator - need legal rep. present when
training.

Records coordinator need this training w/ legal
coordinator.

Want to schedule formal training.
Target date -

Does Sherri want anyone else trained?

Discussed legal rep. available

possible project leaders or coordinators

Arthur McBaugh = NY to audit } as back-up

Corporate audit

Being worked on to back-up Records
coordinator.

Anne = Mentioned her audits } she audits
                                    every employee
watches for new employees - does one on one

new employee
Orientation = } Clare liked idea of
Including Records Mgmt package
at orientation

R Document Creation = sessions =

Electronic Mail - Training ^{In} tell employees
it is a record.
If stored - then it would have to be
produced - ~~they~~ Need to treat email
the same as hard copy.

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Ann = problem is doing it. —
     She does not bring up e-mail —
        but tells empl. it is your
           responsibility to record this

Checks disk boxes —

what were looking at was a
software package that will automatically
clear out after certain length of
time.

Responsibility will be on the employee.

Need
Solutions

Arthur Concern about back-up tapes / discs —
          E-Mail.

Need to find out exactly what problems
are —
    then compile general policy to
handle.

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Susan = old tapes/no machine to run or
Clare = must keep - find machine to verify
what's on them.

Richard = legal dept. role:

* People who function as Records Coord. need
to be trained
Want to

when Train coordinators will have new
manual for issue.
(when Clare gets list of who
to train).

Richard - Role of Legal dept.

New. Records Mgmt. Program &
ensure implementation.

(Needs central area to do that and
legal net requirements.)

Once program in place, it's up
to Records Mgmt. Coordinator to
keep policies going.

Next step ID - coordinators -
get trained - & let them
do their jobs.

Legal dept. - available ~~as~~ not as
"auditors" - but should answer
any questions - that arise.

arthur &
most
his   } Finalize Records Ret. Schedules.
involvement
now.

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All depts need to implement program.

How handle? -

per author
→ Revise manual - gives guidelines
        audit trail for
            disposed records -
Active/inactive

Followed policy
signed   Ret. Schedule }
Document →

Richard
thru Maybe→ Role for corporate audit to ensure
                        compliance of policy.
        [signature]

if records coordinator not doing their job -
should be in per. appraisal.

Arthur
            Inv. Forms - not required, ← Not legal
                                        necessity
Required→ Disposal notice be issued. 7   but there
                    category ...   has to be a
                                            method to document
                                            records →

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Legal - writes manual to address use of inventory forms -

We (coordinators) pass on to employees.

People here (PM Richmond) can meet w/out legal occassionally "compare notes."

arthur = did recommend one master list of Category codes -

but so many individual groups politically (more cost efficient) to break down between depts.

Probably over time that may be done here, too.

NY - will be changing schedule - retention periods - etc. - trying to simplify system.

Legal moving towards this

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X2706

X5731

* Red Express · LC06-1008   Ed Woolridge _ Markarr

* E-mail 7 Update on SDSP?

Shorter Marlboro   * Comparison of nicotine content

our part is executed 7 mailing

2nd tub Mailing in Mail Shorter

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